

STAC Manual

Service Tracking, Accounting, and Claiming System

**Department of Human Resources
Revised November, 2000**

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CHAPTER 1

INTRODUCTION

INTRODUCTION

Development of the **STAC** (Service, Tracking, Accounting, and Claiming) system began in May, 1995, when a workgroup consisting of state and county DHR staff began a series of meetings to devise a way for each county to keep track of flex fund expenditures. Jim Parker, Jackson County DHR Director, had previously developed a Paradox application which was being used for this purpose in his own county. This program, later called Flex '96, was used as the model from which STAC emerged.

STAC was first tested in Jefferson County in January, 1996, and later piloted in Covington County in July, 1996. Some modifications were then made to improve the application. STAC was tested again in Jefferson, Covington, Butler, Autauga, Lowndes, Walker, and Shelby counties during November and December, 1996. STAC was implemented statewide in December, 1996, for counties to begin using officially January 1, 1997.

This most current release of STAC is version 3.22. The release of STAC, known as Version 3, was developed as a result of county input and county testing in five counties. STAC, Version 3, was tested by system users in Chambers, Covington, Madison, Shelby and Tuscaloosa counties in June, July and August, 1998. With a September 4, 1998 release date, STAC Version 3, will allow counties a full fiscal year to gather and report service and expenditure information in a consistent and more convenient manner. The September, 1998 release (Version 3) adds, among other enhancements, reports and two important new features, "Quick Bill" and "Quick Pay". Quick Bill allows entry of services, units of service and delivery dates across weeks or a month with just a few clicks instead of repeating entries for each date of service. Quick Pay allows entry of the check number and check date for different Purchase Orders and many service dates with just a few clicks. Both of these enhancements were designed from county requests to save time and avoid duplicate entry.

Much work has gone into developing a system that allows each of the counties, as different and as unique as they may be, to manage all child welfare funds by tracking each case and client, all services authorized and paid, and the service units used and encumbered. STAC is useful not only in tracking funds, but also in producing federal claims. STAC produces the End of Month Rehab reports used to enter claims into the Medicaid Agency's computerized claims system. STAC should prove to be an invaluable tool for service and financial personnel. Following is a sample of information which can be generated from STAC:

- Disbursements per child and/or per case
- Disbursements per provider
- Disbursements per LGFS fund and/or object code
- Encumbered amount per child and/or case
- Encumbered amount per LGFS fund and/or object code
- Ability to identify high cost cases
- Caseload distribution by worker
- Medicaid Rehab claiming reports for In-House, vendor, and local contract services
- Mailing address labels for providers and clients

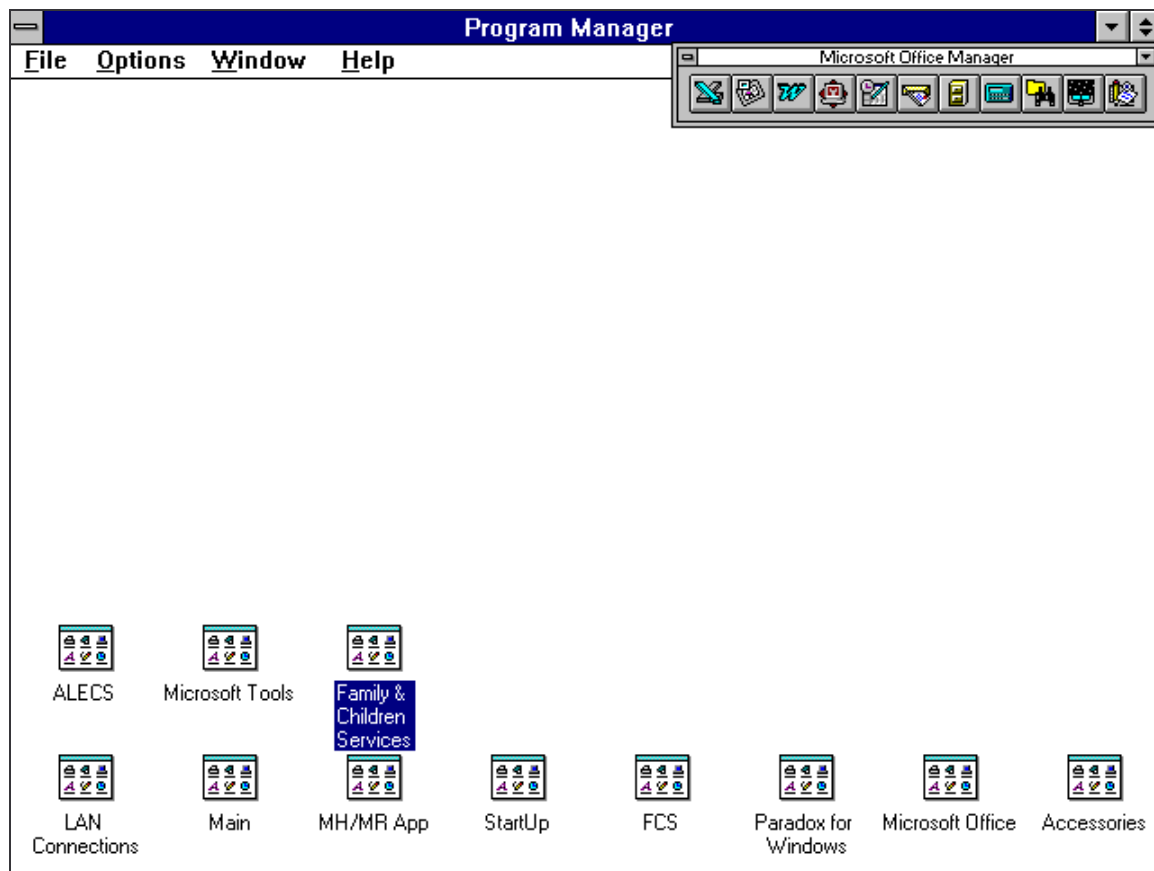
This guide will take you through each screen and explain how the information is put in, as well as how to view it after being entered, and of course, how to generate reports.

IMPORTANT: If you experience problems at any point, **do not turn the computer off** as this may damage data in the system; rather, contact your supervisor or Tech Support at the CIS Help Desk (1-800 429-9508) for assistance.

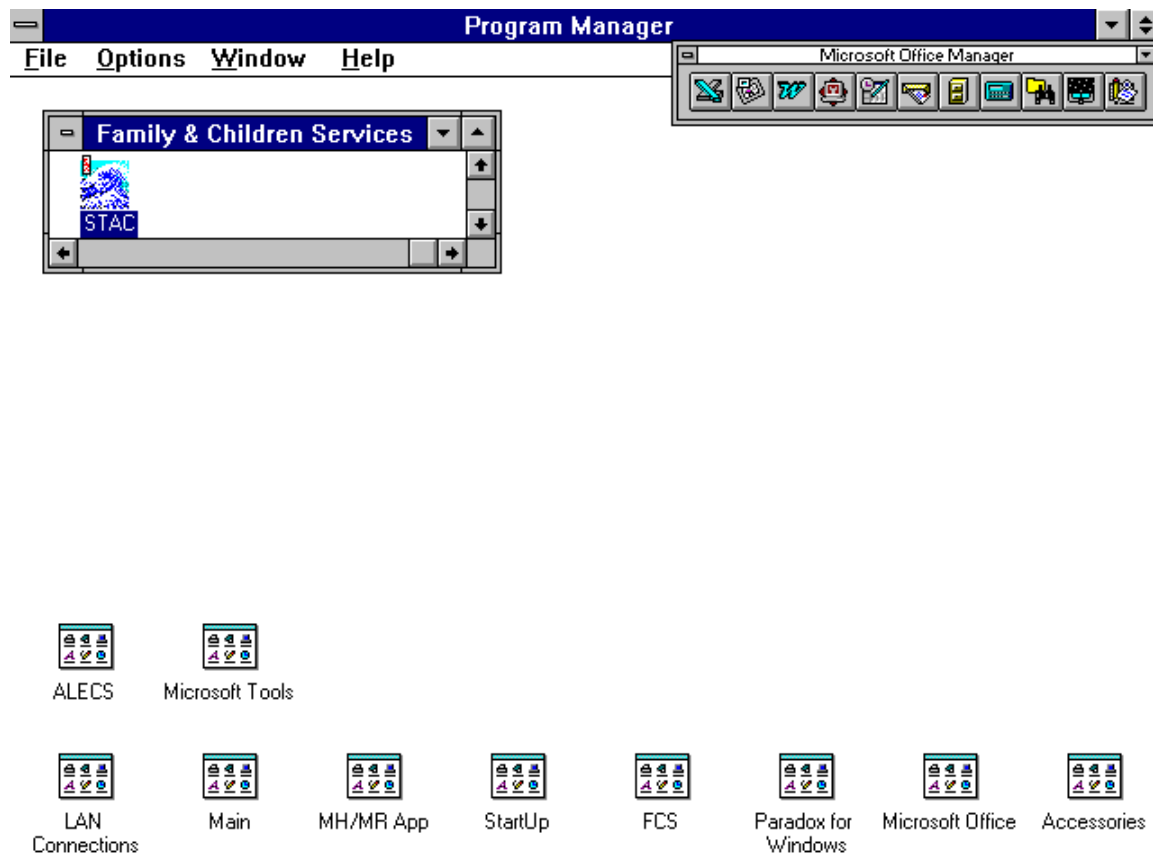
CHAPTER 2

ACCESSING STAC

ACCESSING STAC



In the Program Manager window, double-click the Family and Children Services icon.



In the Family and Children Services window, double-click the STAC icon to open STAC. The screen will display the STAC Main Menu.




CHAPTER 3

STAC MAIN MENU

STAC MAIN MENU





To select an option, simply click on the desired function by using the left button of the mouse.


1	Case/Client Data	Used to enter or edit Case/Client Data
2	Service Authorizations	Used to create Service Authorizations (1878s)/Purchase Orders
3	Service Billing Information	Used to enter bills and payments of services provided and to print disbursements
4	Query	Has been incorporated into the Reports Menu
5	Service Billing LookUp	Used to view services authorized, billed, and disbursed
6	In-House Data	Used mainly to claim for In-House Medicaid Rehab services provided by DHR employees
	Caseload Report	The worker Caseload Report button will produce a list of active cases on STAC assigned to each worker.
	Reports	The Reports button may be used to generate many different types of reports.
	Pending Rehab & Pending In-House	The Pending Rehab Report and the Pending In-House Report buttons are used to generate Medicaid Rehab claiming reports for submission to State DHR.
Exit	Exit	Exit button is used to exit the STAC program.
	Online STAC Manual	Automated version of STAC Manual

STAC BUTTONS

Following is a brief explanation for the use of buttons found on the STAC screens. Examples of these buttons may be found on page 31 which shows the Case/Client screen.

The **Main Menu**  button may be clicked to return to the STAC Main Menu.

The **VCR Controls**  are arrows used to scroll backward and forward through records. Press the button on the extreme left to display the first record. Press the button on the extreme right to display the last record. Press the second button to display the previous record; the third button accesses the next record.

The **Magnifying glass**  button to the right of the **VCR Controls** may be clicked for **Locate Value** help. The screen resulting from clicking this button and instructions are shown on page 31.

The **Locate Next**  button to the right of the **Magnifying glass** is used to continue locating information.

To put the screen in edit mode so that changes may be made, press **F9**. When the screen is in edit mode, the word “**Edit**” will appear in the display line at the bottom of the screen. To end edit mode, press **F9** again.

Another way to locate a purchase order or case is to place the cursor on one of those fields and press the **F12** function button. At that time a Lookup box will appear in the field where your cursor is located. If your cursor is in the PO# field, type in the numbers for the purchase order and the system will bring forward that PO. For more information and instructions, see page 13.

Add buttons should be clicked to add a new record.

Undo buttons are used to back out any changes you are making to an existing record. **Undo** will also back out a new record you are adding.

Delete buttons are used to delete information from STAC. On screens that do not have a **Delete** button, pressing **Control/Delete** on the keyboard will delete information.

NOTE: Deleted information is PERMANENTLY eliminated from STAC.

Done buttons should be clicked when all action has been completed on the screens to take you out of “Edit” mode.

CHAPTER 4

HELPFUL HINTS

&

QUICK LOOKUP

HELPFUL HINTS

- When accessing the STAC application, close out other programs first.
- When closing a program or file, do not exit by double clicking the minus sign in the upper left of the screen. Go to **File** to close. This frees up more memory on the PC.
- It is best to navigate within screens by using **Tab** to move forward and **Shift/Tab** to move backward rather than using the arrows on the keyboard or screen.

If a worker gets locked in the STAC system, a message may appear at the bottom left of your screen (for example, a “key violation”). If this happens, the application is asking for additional information, or you have entered incorrect information. Try clicking on the **Undo** button to back out your changes, then try to re-enter your data. However, if you should experience a lock-up problem, please do not turn off your PC or press **Ctrl/Alt/Delete**. This can damage table headers and create lock file problems. Instead, try holding down the **Control** key and pressing the **Pause/Break** key. Then re-enter Windows and STAC, and the program should run correctly. If you are still locked, please call Tech support at the CIS Help Desk (1-800-429-9508).

- When accessing the STAC application and you receive the following error message: “**Could not initialize IDAPI: Directory is busy**”, click **OK**. Then minimize Program Manager to see what other programs are running. This message appears if you already have the STAC program open. If STAC is not open, close out the other programs and attempt to access STAC again. If you are still unable to access STAC, then call the STAC Help Desk (334-242-9519 reg. or 220-9519 ATTNET)
- If an EDIT TIME OUT BOX should pop-up on the screen, just press OK and resume what you were doing.
- If you can’t locate a Provider that you know has been entered into the system, go to the Provider Data Screen under Utilities and see if the Provider Type has been entered with a little letter. There should be an edit to change these to a capital, but it may let some slip through. If everything looks okay, then call the STAC Help Desk at REG: 334/242-9519 or ATTNET: 220-9519.

Quick LookUp (the “F12” key)

A new feature has been added to STAC, Version 3, that will make locating records faster and easier. The "**Quick LookUp**" function searches from the end to the beginning, i.e. the most recent entries to the oldest. It also performs advanced matching patterns by default, and is more intuitive to use.

Previously, using the **LOCATE** button, several steps were required to perform a locate on a field by selecting the field to search, selecting advanced pattern, etc. In this process, the locate box would search from the beginning to the end.

JEFFERSON Co. Service Tracking, Accounting, & Claiming System -...

File Edit View Form Record Properties Tools Window Help

Main Menu Print Case Add Undo Delete Case

Case # 0 Case Type PS Address 1234 Sample Street

Open Date 1/3/1997 Case Close Date Address Apt 1

Case Name Test Case 1 City Montgomery

Worker SSN 123-45-6789 WORKER, WATT A State AL Zip 36116

Super SSN 999-99-9999 VISOR, SUPE R Phone (000) 000-0000

Done Undo Copy Client Delete Client

ACTIVE

Family Indicator A Medicaid Status Y Other Insurance #

Medicaid #/SSN 000-222-22-2222-2 Other Ins Group Policy #

Primary Diagnosis Code 574454 Other Ins Name

Last Name Girp EPSDT Provider # 123456

First Name Geranium EPSDT Screening Date 2/12/1998

Middle Initial G EA Status Y EPSDT Referral Date

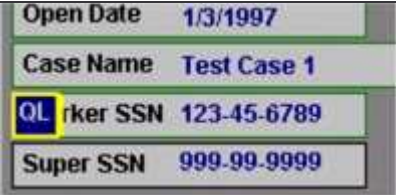

EA From Date 1/1/1998 Intake Evaluation Date

EA To Date 1/1/1998 ACWS Provider # 123123

1 of 701 [FCSCASE:ISPCASE.DB]

I. First open up the Case/Client Data Screen, and then move to the Worker SSN field. For the purposes of this exercise look for Worker SSN 123-45-6778. (Follow along using your system -- but you may want to look for a different Worker SSN.) To look for all PO's with the Worker SSN 123-45-6778, hit the **F12** key.

Notice two things happened

<ul style="list-style-type: none">A “QL” indicator opened up on the case# field showing us that the field we’re searching is in the Quick LookUp mode	
	<ul style="list-style-type: none">The “LookUp” field has appeared under the VCR buttons. This displays our search criteria

I. Begin by typing 45111..Notice that we are *not* typing over the case#, but rather what we’ve typed appears in the LookUp field. For *as long as the QL is present, nothing you type will change STAC data.*



Now hit the enter key and the system (starting from the most recent service authorization) begins looking backwards for a match. In this case, it finds one --the **QL** box is now changed to green-- and the LookUp box is also indicating “Found”.

This is not the PO I'm looking for.

JEFFERSON Co. Service Tracking, Accounting, & Claiming System -...

File Edit View Form Record Properties Tools Window Help

Main Menu Print Case Add Undo Delete Case

Cannot find another 123-45-6778

Case # 888889 Case Type PS Address 1234 Testy Street

Open Date 4/28/1998 Case Close Date 5/30/1998 Address

Case Name Darlene Watson City Montgomery

QL rker SSN 123-45-6778 Test, Test State AL Zip 36112

Super SSN Phone 334-2888

Done Undo Copy Client Delete Client

ACTIVE

Family Indicator A Medicaid Status N Other Insurance # 123456789

Medicaid #/SSN 000-454-45-4545- Other Ins Group Policy # 789456132

Primary Diagnosis Code V6290 Other Ins Name ALFA

Last Name Watson EPSDT Provider # 5855458555

First Name Darlene EPSDT Screening Date 5/30/1998

Middle Initial B EA Status Y EPSDT Referral Date 5/30/1998

EA From Date 4/28/1998 Intake Evaluation Date 5/30/1998

EA To Date 5/30/1998 ACWS Provider # 456465

Cannot find "123-45-6778" --Try something else --or hit ESC to stop

To continue searching backwards, I keep hitting the enter key. The search will continue until it cannot find another match and until it gets to the very beginning of the table. At that time the **QL** box turns red, and the locate box indicates "Cannot find".

III. To leave the **Quick Lookup**, hit the ESC key, or mouse click anywhere on the screen, or use your arrow keys. Just about any action other than the return key will shut off Quick Locate. For most screens and fields the **Quick Lookup** works. For those that won't, you will receive a message when you hit the **F12** key.

Reference page 34 for more information on using wildcards.

CHAPTER 5

START-UP INFORMATION

START-UP INFORMATION

- Client expenditures required to be tracked through STAC include all flex, former placement prevention and former targeted case management funds with the exception of private earmarked accounts and ILP funds. “Walk in” clients who are not registered on FSS and whose cases are not open to service do not have to be tracked.
- Although counties are not required to track client private earmarked accounts, a county may track these accounts if desired. However, the client’s subsidiary account would need to be entered on STAC differently from the way in which it is entered on LGFS. In the subsidiary, the eighth character, which is the source of funds, needs to be entered before the first character, which is the sibling code. For example, if the subsidiary on LGFS is ST4/B004379S, it would be entered on STAC as ST4/SB004379. This is because the first two subsidiary characters on STAC are alpha only. For additional information on entering LGFS data, see page 18 in the Utilities Chapter.
- A worker must be added as a STAC user before being able to access STAC. Contact your county LSA to add a new STAC user. A DHR LAN Security Form must be signed by your county designee authorizing a worker to be added as a STAC user. Once this has been done, your LSA can give the worker access to STAC.
- Before using STAC to authorize services and make payments, be sure that information in the Case/Client Data and in Utilities is accurate. Refer to the Utilities section in this manual for information on the County, LGFS, Worker, Supervisor, and Provider Data tables. In Case/Client Data, check to see that the following is correct:
 - Last name, first name and middle initial (child’s name MUST match Medicaid System on MSIQ screen)
 - Medicaid Status
 - EA Status (If Y, From and To dates must be entered)
 - EPSDT information
 - Worker and Supervisor names

NOTE: Rehab claims and LGFS object codes will not be correct unless the Medicaid and EA information is entered.